

# THE IMPACTS OF VALLETTA 2018 2016 Research



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# INTRODUCTION

The Valletta 2018 Foundation's Evaluation and Monitoring plan enables the Foundation to assess the success, or otherwise, of the process in a consistent, accessible and comparable manner. The Valletta 2018 Foundation Evaluation & Monitoring Research Plan is structured around 5 research themes, with each theme containing separate studies.

The Foundation has set up an Evaluation & Monitoring Steering Committee to monitor and evaluate the process and impacts of Valletta as an ECoC. The Steering Committee is composed of four public entities and five researchers who are conducting research of a quantitative and qualitative manner. The process is coordinated and managed by the Research Department of the Valletta 2018 Foundation. The research process will run for the period 2015-2019. Baseline studies were carried out in 2015. Research studies are being carried out during the period 2016 to 2018, with results being presented annually.



Research Theme	Objectives	Research Study	Researcher/Entity
Cultural and Territorial Vibrancy	To evaluate the success of Valletta 2018 in encouraging cultural participation by the general public and different community groups.	Valletta Participation Survey	National Statistics Office
		Culture Participation Survey	Arts Council Malta, National Statistics Office & Valletta 2018 Foundation
		A Comprehensive Analysis of the Valletta 2018 Programme	Daniela Blagojevic Vella
		The Impact of Valletta 2018 on the European Identity of the Maltese Population	Dr Marcello Carammia
Governance and Finance	To understand the investment and management of Valletta 2018 and its related impact on Malta's creative sector	Creative Economy Report: 2016 Update	Economic Policy Department
		Creating a Career in the Cultural & Creative Industries	Jobsplus
Community Inclusion and Space	To assess the impact of Valletta 2018, and its cultural and infrastructural regeneration projects on various community groups	Community Inclusion & Accessibility in Valletta 2018	Michael Deguara
		Assessing the relationship between community inclusion and space through Valletta 2018 cultural infrastructural projects	Dr Antoine Zammit
The Tourist Experience	To evaluate the changes in visitor profile, tourist expenditure and visitor motivation to travel as a result of Valletta 2018	Market Profile Survey	Malta Tourism Authority
		Locality Survey	Malta Tourism Authority
The Valletta Brand	To understand the success of the Valletta 2018 communication strategy within different communities	Audiences' Experiences of the Valletta 2018 Brand	Dr Emanuel Said
		Social Media Analytics	Valletta 2018 Foundation



# 1

## CULTURAL & TERRITORIAL VIBRANCY

### VALLETTA PARTICIPATION SURVEY

**National Statistics Office**

#### **Objectives**

The scope of the Valletta Participation Survey is to measure the level of participation and interest of the Maltese population in cultural activities organised in Valletta, many of which are organised as part of Valletta 2018.

#### **Methodology**

The target population of the Valletta Participation Survey consists of persons aged 16 years and over who are living in households in the Maltese Islands. All localities in Malta and Gozo are equally covered in this survey, (sample size of 1,000) with the exception of Valletta, where over-sampling was implemented so as to ensure an adequate representation of results in the final sample. Data collection was carried out through telephone interviewing (CATI) in September 2016. An 81% response rate was obtained in 2016, compared to a response rate of 84% in 2014 and 77% in 2015.

#### **Results**

Trends from previous editions (2014 and 2015) were confirmed in the 2016 survey. The most popular type of cultural activity are 'city-wide activities' (such as Notte Bianca), followed by Carnival. Live theatre performance saw the highest increase in participation for the period 2014 to 2016 (11% in 2014, 13% in 2015 and 17% in 2016).

42% of respondents are very likely to participate in activities organised by Valletta 2018. Awareness of Valletta 2018 is at 67%, up 4% from 2015. The main source of information is television (57%). With regards to the changes and perception of change happening in Valletta, 86% of respondents believe that Valletta is changing for the better. Businesses in Valletta are perceived to be the greatest beneficiaries of Valletta 2018.

### **Way forward**

The Valletta Participation Survey will be repeated in the third quarter of 2017. The survey will be carried out twice in 2018.

## **CULTURE PARTICIPATION SURVEY**

**Arts Council Malta, National Statistics Office & Valletta 2018 Foundation**

### **Objectives**

The Culture Participation Survey is a collaboration between Arts Council Malta, National Statistics Office and the Valletta 2018 Foundation. The scope of the Culture Participation Survey is to analyse the degree and type of participation in cultural activity by the Maltese population and to understand the prevailing attitudes towards culture and the arts. An analysis of the data from this survey will enable a detailed audience segmentation exercise to be carried out as well as a qualitative assessment with regard to correlation between participation in cultural activities and quality of life and well-being.

### **Methodology**

Quantitative survey carried out in November 2016 by the National Statistics Office with a sample size of 1,500.

### **Results**

The survey is a follow up to the survey which was carried out in 2011. Aside from attendance and participation in cultural activities, the survey also looks at attitudes, lifestyles, use of the internet for cultural purposes, as well as activities such as reading, listening to music and hobbies.

The revised survey has an increased focus on obtaining a clearer profile of attendees and participants to cultural events, including rates of attendances and the main source of information on cultural events. The survey also looks at language preferences in cultural consumption and personal perceptions towards culture and the arts while examining respondents' perceived role within the cultural sector. A section specific to Valletta 2018 and awareness of the ECoC has also been included.

Results are currently being analysed. These will be published in June 2017. An audience segmentation analysis has been commissioned by Arts Council Malta while the Valletta 2018 Foundation has commissioned an analysis on the relationship between life satisfaction and cultural participation.

### **Way forward**

The Culture Participation Survey is a follow up from the same survey carried out in 2011. A follow up study will be carried out post 2018.

## **A COMPREHENSIVE ANALYSIS OF THE VALLETTA 2018**

**Daniela Blagojevic Vella**

### **Objectives**

In the run-up to 2018, the main objective of this study is to analyse the creation and development of the Valletta 2018 Cultural Programme and the individual projects included in this Programme.

In 2016, the study set out to further investigate the strategies and practices currently in place to develop this Programme. The aim is to understand how the Valletta 2018 Foundation and various project leaders transfer their visions into objectives, and how they work to create a balanced cultural offer, place the citizen at the centre of their projects and strive towards a European dimension within their projects.

### **Methodology**

This qualitative study adopts a mixed method approach to reflect multi-dimensional dynamics of the Cultural Programme and the developments unfolding over five years. The research includes an institutional level analysis, mapping and surveying of projects, as well as semi-structured interviews and focus groups.

In 2016, data was gathered primarily through in-depth interviews, focus groups and project visits. The interviews and focus group studies have been carried out with:

1. Foundation Programming team members and management;
2. Creators, co-creators and producers of projects in the Cultural Programme;
3. Key persons from Public Cultural Organisations;
4. Independent artists and groups.

The interviews were transcribed and coded according to specific themes being analysed namely (i) cultural offer and programming balance (ii) audience participation (iii) European collaboration.



## **Results to date**

Research shows clear progress in the consolidation of the Valletta 2018 Cultural Programme. In particular, the information gathered in 2016 shows an intensified drive towards contemporary projects, establishing international links and exploiting the Euro-Mediterranean dimension.

The interpretation of audience participation and engagement varies amongst different interviewees involved in projects, ranging from grassroots community projects to large scale projects. However, the study also indicates that interviewees share a common vision of striving towards widening participation and with this a common concern that this requires ongoing efforts.

The findings also reveal that further capacity building, development of knowledge, competences, skills and contacts are required by the Maltese cultural players involved in the delivery of Valletta 2018 projects, as the implementation of projects at such a scale is largely unprecedented.

The interviews and observations also serve to elicit ongoing feedback. In particular the study highlights the need for project leaders to understand the objectives of Valletta 2018 beyond the targets of their individual project, the need for producers to share best practices in audience engagement strategies and the Foundation's and the Regional Coordinators' role in assisting producers to create links with stakeholders.

## **Way forward**

In early 2017, an online questionnaire will be sent to the producers of all the projects included in the 2018 Cultural Programme. Project visits are expected to increase as most projects which are currently in planning or research phase will be implemented in 2017. Three focus-groups will be organised in the second quarter of 2017 while in-depth interviews and project visits will be organised throughout the year up to 2018.

# THE IMPACT OF VALLETTA 2018 ON THE EUROPEAN IDENTITY OF THE MALTESE POPULATION

**Dr Marcello Carammia & Dr Marie Briguglio**

## **Objectives**

This research study contributes towards the analysis of the impact of Valletta 2018 by examining whether 'European identity' may be affected by the Programme, to what extent, and among what segments of the population.

## **Methodology**

This study applies a mixed-method impact assessment approach to monitor the impact of Valletta 2018 on European identity in the Maltese society. A desktop research exercise carried out in 2015, capitalising on several European and national data sources, forms the basis of the study. Quantitative large-scale surveys will be carried out in the early (2016) and final (2018) years in order to obtain systematic comparable data. Intensive interviews with focus groups will be carried out in 2017 and 2019 to obtain a deeper insight on the nature, degree, and causes of identity change (if any).

## **Results**

A cross-sectional quantitative survey, based on computer assisted telephone interviews (CATI) was carried out between September and October 2016 with a sample of over 850 respondents. The dataset was duly anonymised, checked, cleaned and coded for analysis.

This study focused on initial test of two hypotheses. The first hypothesis concerns whether exposure to ECoC is influenced by controls and demographic variables. In line with similar literature for other countries which hosted ECoCs, a positive correlation exists between respondents who are aware of Valletta 2018 and who have actively participated in a Valletta Capital of Culture event, and those that have on average visited the Valletta 2018 website.

In relation to the research question, ECoC exposure in 2016 was associated with a stronger sense of European Identity, and so too were other factors like education, interest in politics, age, and institutional trust.

## **Way forward**

Focus group analysis will start in 2017. Such analysis will be qualitative in nature and will focus on the nuances that numbers may not reveal. As evident by field literature, the question of feeling European is inherently complex. To this end, focus groups will help to provide further insights, explanation, depth and texture as recommended by ECoCs stock-taking documents. A second large-scale survey will be carried out in 2018 to yield a panel of observations.



# 2

## GOVERNANCE & FINANCE

### CREATIVE ECONOMY REPORT: 2016 UPDATE

**Economic Policy Department, Ministry for Finance**

#### Objectives

The aim of this study is to update the 2014 Creative Economy Report which gives an overview of the creative economy and its various sub-sectors. The update is based on unpublished National Statistics Office (NSO) national accounts statistics of output at 2-Digit NACE and also employment data obtained from Jobsplus.

#### Methodology

The study uses the 2014 Report data as a base. This data was in turn based on detailed information at 4-digit level available from the Structural Business Statistics (SBS) issued from the NSO, although some issues in terms of comparability have been encountered in view of the SBS no longer containing detailed sectorial data at 4-digit level. The major constraint is actually deemed to be in the underrepresentation of the arts which are predominantly based on NACE 90 (Creative Arts and Entertainment Activities) and do not therefore allow an accurate distinction between the annual performance of visual arts, performing arts and music. Cultural education is assumed to move in line with the overall growth in total education activities in Malta. The significantly high representation of the crafts sector by NACE 23 (manufacture of non-metallic minerals) may also be a notable limitation. In this context the detailed results at a sub-sector level should be viewed with more caution.

## Results

Findings suggest that:

- The CCLs have outperformed the rest of the economy between 2010 and 2015 and their share of gross value added has increased from 6% in 2010 to 7% in 2015.
- The CCLs continued to grow at an average of 9% per annum between 2010 and 2015, almost matching the performance recorded in 2005 and 2010:
  - The Creative Business Services continued to grow at 10% per annum between 2010 and 2015, only marginally less than the performance recorded in 2005 and 2010;
  - The media sector continued to slow down, registering a rate of growth of 4% between 2010 and 2015, compared to 5% in the previous five year period;
  - The Arts was the most dynamic sector among the CCLs, registering double-digit growth rates of 15% per annum between 2010 and 2015, marginally less than the preceding five-year period;
  - The heritage sector recovered completely from the decline registered in the preceding five-year period and registered a very healthy average growth rate of 9% over the 2010 and 2015 period.
- Job creation in the CCLs almost tripled in the latter 5-year period. The CCLs created 2,800 new jobs between 2010 and 2015, compared to an increase of 1,100 new jobs between 2005 and 2010.
- Employment in the CCLs increased by a significant rate of 5% average annual growth between 2010 and 2015, with average annual growth in creative business services reaching 8% and in the arts reaching 6%
- Employment growth in the Heritage sector reached a more modest 1% which, considering the growth in value added, indicates labour productivity gains.
- In the Media sector, employment declined by an annual average of 1%, reversing the gains in the previous five years. Nevertheless, in view of the rise in value added, this also indicates labour productivity gains in the sector.

## Way forward

The results could be matched by secondary data to evaluate their robustness and possibly improve accuracy particularly in the heritage and arts sector. This could be explored in the next update of the report, which update will also include the 2016 data.

# CREATING A CAREER IN THE CULTURAL & CREATIVE INDUSTRIES

## Jobsplus

### Objectives

The main objective of Jobsplus' research is to establish the impact of Valletta 2018 on Malta's Creative Sector from an employment perspective.

### Methodology

A mixed methodological approach has been implemented, i.e. both quantitative and qualitative methods were used in the analysis process. The figures are analysed on a quarterly basis as well as on an annual basis and will cover the period 2014 – 2020.

### Results

Full time employment in CCI increased by 12% over the two-year period of 2014-2016, reaching a total of 9,685 in Q1 2016. 22% of full-time employment in CCI were in computer programming activities, with other major contributors being printing, advertising and the architectural sector. Part time employment increased by 10% over the same period, however trends in part time employment are far more volatile compared to full time employment, which maintains relatively stable growth throughout the period of analysis. In total, employment in CCI (on both a full and part time basis) amounted to 11,483 at the end of Q1 2016, almost 5.5% of employment in the total economy.

Advertised vacancies in CCI was somewhat volatile, with frequent changes from one quarter to the next. As at the end of September 2016, the number of vacancies notified to Jobsplus relating to CCI accounted for 7.98% of total number of vacancies notified to Jobsplus, with most vacancies being related to printing services or announcers on radio, TV and other media. In parallel, the number of jobseekers in CCI decreased from 483 in Q1 2014 to 324 in Q3 2016. These changes are in line with those in other sectors and with the general decrease in unemployment in the Maltese labour market.

### Way forward

A continuous statistical analysis will carry on during the coming years up to 2019 both on a quarterly basis as well as on an annual basis. The National Commission for Further and Higher Education (NCHFE), Jobsplus and Malta Enterprise have conducted an Employee Skills Survey during 2016 and a detailed report of the results is to be published in the coming months. Once such report is published, Jobsplus will undertake an exercise to extract the results relating to CCI accordingly.





# 3

## COMMUNITY INCLUSION & SPACE

### COMMUNITY INCLUSION AND ACCESSIBILITY IN VALLETTA 2018

**Michael Deguara**

#### Objectives

This research aims to identify factors affecting participation by various community groups in the Valletta 2018 project, with particular emphasis on elements that promote or hinder inclusion of a diverse audience, and accessibility (including physical, geographical, financial, linguistic, and intellectual). The research cycle for 2016 also explored the awareness that respondents have of the Valletta 2018 Cultural Programme, both in terms of individual events and its general aims and impact, and brings to the fore concerns and observations related to gentrification.

#### Methodology

The Methodology remains largely unchanged from the previous cycle, with semi-structured interviews being carried out with four individuals from each of six groups, namely (1) Beltin<sup>1</sup> residing in Valletta; (2) Beltin residing outside Valletta; (3) non-Beltin residing in Valletta; (4) respondents from the Inner Harbour area, also defined as Greater Valletta; (5) respondents from other parts of Malta; and (6) persons with disability.

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<sup>1</sup> Beltin refers to people who define themselves as originating from Valletta

## **Results to date**

There is an overarching realisation among all community groups that the social fabric of Valletta is changing at a rapid rate. There is a generally positive attitude with regard to the changes which are understood to have been triggered by Valletta 2018, even if not directly related to the Cultural Programme, since these changes are often seen as upgrading Valletta's profile both culturally and infrastructurally.

Changes observed by respondents, in part, echo last year's results, namely the increase in effort related to the upkeep of buildings, and the number of cultural events, catering establishments and boutique hotels. Other observations include the typical day-to-day issues related to Valletta, including cleanliness and accessibility. There is an increased concern over affordability, particularly in terms of property prices.

With regard to the Cultural Programme, there has been an increased awareness in comparison to the previous year, although most respondents were unsure or unaware that certain projects or events fell under the Valletta 2018 Cultural Programme. Initiatives of a more overtly public and collective nature, such as the Notte Bianca and the Valletta Green Festival, were understandably more widely known than projects which have so far had limited visibility. It was noted by many respondents that they felt the Cultural Programme as a whole needed more visibility.

Cultural infrastructure projects, were generally welcomed as updates to the existing infrastructure. However respondents also expressed concerns in terms of affordability and affordability for locals. Respondents also expressed hope that Valletta 2018 will further improve accessibility in the city.

## **Way forward**

The model used so far with regard to individual interviews from six identified community groups will be retained. This model has since been complemented by meetings with the Valletta 2018 Programme Coordinator, which will be maintained on a quarterly basis, as well as meetings with persons leading community-based programmes.

# ASSESSING THE RELATIONSHIP BETWEEN COMMUNITY INCLUSION AND SPACE THROUGH VALLETTA 2018 CULTURAL INFRASTRUCTURAL PROJECTS

**Dr Antoine Zammit**

## Objectives

The scope of this research is to understand the spatial (physical) and social (behavioral) impact of cultural infrastructure, primarily architectural and urban design interventions, in terms of broader culture-led regeneration objectives for the various community and stakeholder groups. The focus of this research are the four Valletta 2018 cultural infrastructural projects, namely MUŻA, the Valletta Indoor Market (Is-Suq tal-Belt), Strait Street and the Valletta Design Cluster<sup>2</sup>, and their immediate neighbourhoods.

## Methodology

This is a mixed-methods approach comprising deductive and inductive avenues and qualitative and quantitative methods. Stages include an initial literature review leading to a theoretical framework that is piloted on the ground to become an analytical framework, followed by application of such framework to the case study areas to assess their physical urban design quality. A behavioral analysis (structured observations) and follow up expert interviews enable an understanding of broader, non-physical phenomena that are influencing the urban spaces. This feeds into PPGIS workshops, which provide this research with a bottom up perspective that is matched up with the results emanating from the other research stages.

## Results

Key findings from each of the analyses carried out are:

- Spatial quality and built fabric analysis: There is a direct correlation of results from the spatial quality analysis and the Census data, wherein the MUŻA neighbourhood scores highest and Biċċerija tends to have the lowest quality rating in terms of spatial quality and built fabric out of the four sites.
- Land use analysis: The MUŻA neighbourhood has the highest presence of active frontages (from ground floor use analysis), meaning the highest degree of vitality, an important contributor to spatial quality. The predominant land use in the Biċċerija neighbourhood, Strait Street and the Valletta Indoor Market is residential whereas in the MUŻA neighbourhood it is offices.
- Analysis of development planning applications in terms of change of use: The study reveals that the highest impact due to change of uses (in terms of

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<sup>2</sup> The Valletta Design Cluster Project is currently being developed in the area commonly known as *Il-Biċċerija*

people generation/movement, visual, aural, olfactory implications and litter generation) for all categories throughout the period 2012 (the year Valletta was announced as European Capital of Culture) to 2016 is within the Biċċerija neighbourhood, and least within the MUŻA neighbourhood. Post-2012, the amount of development planning applications for change of use has increased significantly. In the Biċċerija neighbourhood and along Strait Street, the majority of the premises are changing their uses into commercial uses (from residential or vacant premises), or into a higher level of commercial use (for instance, from office to retail, or from retail to catering).

- Social analysis: Although the spatial and social data is from different sources and thus non-comparable, it is worth noting that the highest percentages for illiterate, unemployed and non-schooled residents corresponds to the lowest spatial quality score and reported state of repair for the building stock within the Biċċerija neighbourhood. This may lead one to speculate that there may be a direct correlation between the state of the urban space/housing conditions and the level of achievement of the residents but this is a point which should be investigated through further research.
- Behavioural analysis: Collating behavioural patterns into broad categories illustrates that Strait Street, the Biċċerija and the Valletta Indoor Market neighbourhoods are dominated by sensorial/environmental influences whereas Pjazza Jean De Valette (MUŻA neighbourhood) is dominated by people/users and their interaction. The changing nature of the four sites will play a major role in either reinforcing or changing the nature of the behavioural influences.

### **Way forward**

In 2017, this research will converge the various results to be able to understand the socio-spatial implications on the four neighbourhoods in question. The PPGIS, which will take place during 2017, will allow this research to include a bottom-up approach to complement the top-down data available as at to date. A pilot exercise around the Valletta Design Cluster has been carried out in late 2016 and results are currently being analysed. The exercise will be spread around all areas included in this study throughout 2017.



# 4

## THE TOURIST EXPERIENCE

### MARKET PROFILE SURVEY

**Malta Tourism Authority**

#### Objectives

The Market Profile Survey data will serve to monitor trends in visitor profiles, experiences and perceptions, as a result of Valletta 2018 for the period 2015–2019. A detailed profiling exercise of tourists opting to reside in accommodation within the parameters of Valletta and Floriana will also be undertaken. The Market Profile Survey will also allow for the estimation of the share of cultural tourism and different categories of cultural tourism based on levels of interest.

#### Methodology

The Market Profile Survey is an ongoing postal questionnaire, which is randomly distributed to tourists on their arrival at the Malta International Airport. Survey participants self-administered the questionnaire towards the end of their stay in Malta and return it to the Malta Tourism Authority via pre-paid post. The target audience comprises tourists residing in Malta's main source tourism markets, namely the United Kingdom, Ireland, Italy, Germany, France, Spain, Netherlands, Belgium, Austria, Switzerland and the Nordic Countries.

#### Results

8% of total respondents (N=2,483) resided in accommodation facilities in Valletta/Floriana during the period of January to June 2016. Tourists opting to stay in Valletta/Floriana exhibit a relatively high interest in history and culture.



25% can be termed as 'greatly motivated' by culture in their decision to visit Malta. In comparison, tourists staying in other parts of the island who are 'greatly motivated' by culture represent a lower share of 11%.

Tourists staying in Valletta/Floriana have a higher participation in culture-related activities when compared to tourists staying in other parts of Malta. Indeed, the former have a higher engagement in terms of visits to museums, churches, historical buildings and temples/archaeological sites.

Likewise, there is also a higher engagement in events such as live music events/concerts and the performing arts. 8% of tourists residing in Valletta/Floriana attended theatre/musical/opera/dance compared to 3% of visitors residing in other parts of Malta. 11% of tourist residing in Valletta/Floriana attended live music events/concerts compared to 4% of tourists residing elsewhere in Malta whereas 16% of tourists residing Valletta/Floriana attended a local festival/event compares to 11% of tourists residing in other parts of Malta.

### **Way forward**

The Market Profile Survey is being carried out on a continuous basis. Data collection is planned to continue in 2017 through to 2019, and the identified indicators will continue to be monitored for the duration of these set timeframes.

## **LOCALITY SURVEY**

### **Malta Tourism Authority**

#### **Objectives**

The Locality Survey enables the profiling of tourists visiting Valletta and their evaluation of the city's product offer. It also give insight into tourists' awareness of Valletta as a European Capital of Culture (pre-trip and during their trip awareness), and the levels of cultural participation.

#### **Methodology**

The Locality Survey is an ongoing research exercise. Questionnaires are distributed to tourists of any nationality who are visiting or staying in designated heritage (Valletta, Mdina, Birgu) and coastal localities (Sliema, St. Julian's, St. Paul's Bay, Mellieha). The questionnaire, which entails tourists' evaluation of the physical and service offer within the identified localities, is self-completed by respondents and returned by post via business reply service.

## **Results**

For the period January to September 2016, there was a sample of 691 respondents who completed the Valletta, Mdina, Birgu-specific questionnaires. Out of the total sample, 28% were aware that Valletta will be the European Capital of Culture in 2018 prior to their visit to Malta. Slightly more than six out of ten respondents (66%) who were not aware of Valletta 2018 prior to their trip became aware whilst visiting, mainly via tourism personnel (16%), or the local community (11%). 4% of respondents specifically indicated Valletta 2018 as one of their main motivations for choosing to visit Malta.

For the period of January to September 2016, there was a sample of 305 respondents who participated in the Valletta-specific Locality Survey. Most respondents were satisfied with the accessibility of sites and amenities, the availability of open spaces and the upkeep of gardens and open spaces. Lower satisfaction levels emerged with regards to general infrastructure, namely availability of parking, state of pavements, pedestrian signage, road signs, and availability and cleanliness of public conveniences.

## **Way forward**

Data collection relating to the Locality Survey is ongoing and will continue in 2017.



# 5

## THE VALLETTA BRAND

### AUDIENCES' EXPERIENCES OF THE VALLETTA 2018 BRAND

**Dr Emanuel Said**

#### Objectives

The study aims to offer an insight into how audiences engage with the different forms of communication forming part of the Valletta 2018 communications programme. Longitudinal in nature, this project aims to determine the effects that each type of communications purport on different audiences as reflected in individuals' attitudes and behaviours.

#### Methodology

In acknowledging that audiences engage with brands through a multitude of encounters that range from direct instances<sup>3</sup> to other indirect experiences<sup>4</sup>, the study adopts a mixed methods approach involving real time experience tracking (RET) (Baxendale, Macdonald, & Wilson, 2015; Macdonald, Wilson, & Konus, 2012) as well as focus group discussions about audiences perceptions on encounters and experiences with the Valletta 2018 brand.

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<sup>3</sup> like advertising or actual event participation

<sup>4</sup> involving word of mouth from friends or acquaintances or third party social media contributions (as would be acquaintances posting on Facebook, Twitter or Instagram among others)

Key to this methodology is the use of a custom-designed smart phone app that offers an improved participant engagement with RET approaches. This app presents participants with a series of questions related to personality characteristics (to ease individuals' clustering) as well as brand experience (by relating to sensory, affective and intellectual dimensions that are relevant to Valletta 2018 as an experienced brand).

## **Results**

Participants could be categorised in three personality types: resilient, undercontrollers and overcontrollers. Resilient personalities are characterised by distinct levels of neuroticism and above average extroversion, agreeableness, openness and conscientiousness. Overcontrolled personalities lack extroversion and openness but feature relatively high levels of neuroticism, whereas undercontrolled personalities lack agreeableness and conscientiousness but feature relatively higher levels of neuroticism.

Members of the resilient group tend to form a weaker impression about Valletta 2018 following their participation in the brand, potentially as a result of the brand's loss of appeal to the participants' senses. This change is also manifest as a weakening of emotions evoked by the Valletta 2018 brand among members of this group, who see their curiosity and cognitive (intellectual) engagement declining.

Most encounters reported were related to the Valletta Pageant of the Seas, followed by the Valletta Film Festival and Ghanafest. Most encounters involved internet browsing, television viewing chats with acquaintances or face-to-face. On a five point scale, participants perceived the Malta International Arts Festival as the event that offered most value and motivated participation, followed by Strada Stretta events and the Malta Jazz Festival. Participants found the Malta Jazz Festival, Strada Stretta events, the Valletta Green Festival and the Pageant of the Seas as the more satisfying experiences.

## **Way forward**

Qualitative interviews and focus group discussions with event participants and related stakeholders are in progress. The results of the qualitative data analysis related to these research work areas are also expected to be published in the first quarter of 2017. RET data collection is planned to happen between May and July 2017, while any additional qualitative work is planned to take place in September/October 2017.

# **SOCIAL MEDIA ANALYTICS**

## **Valletta 2018 Foundation**

### **Objectives**

The scope of this study is to understand the performance of the Valletta 2018 communications strategy within local and international communities. The expected outcome of this study is the quantification of the visibility of Valletta 2018 through different forms of media, highlighting different typology and sources.

### **Methodology**

Monitoring of social media analytics through brand monitoring software and social media channels. This is supplemented by ongoing manual monitoring of local print media publications, including newspapers and magazines.

### **Results**

1,894 mentions of the phrase 'Valletta 2018' were captured across various social media channels during the period 1st July to 31st December 2016, with an average of 68 mentions per day. 40% of such mentions were on Twitter. The most popular time is on Friday afternoons (noon to 1800 hours). The most popular day during the period captured was the 25th November, during the 'Cities as Community Spaces' conference with 271 mentions in various social media.

The most popular terms used are those specifically related to Valletta 2018, Valletta and Malta. Other popular keywords include, 'ccs2016' (related to the Valletta 2018 Annual Conference, 'culture', 'arts', 'capital', 'community', 'foundation', and 'European'. The Valletta 2018 Facebook page had a total of 15,112 likes as at 31st December 2016 and the Foundation's Twitter profile had 5,704 followers.

The Foundation's website was visited 110,670 times by 75,941 users throughout 2016. There were a total of 386 articles in local print media, referring to Valletta 2018 or related activities, projects and events throughout 2016.

### **Way forward**

Monitoring of both online and print media will be ongoing throughout 2017 and beyond.





# CONCLUDING REMARKS

The Evaluation and Monitoring process started in 2015 and will conclude in 2019. This is a longitudinal research process that will help the Valletta 2018 Foundation, and the wider cultural sector, better understand the impacts of the European Capital of Culture title during the stages of planning, production and implementation.

During 2016, the research results from the previous year were utilised internally to allow the Foundation to rethink part of its projects and allow for an ever deeper understanding of the programme from a wider aspect. This allowed the Foundation to ensure it is in line with the needs and motivations of local communities and cultural practitioners and that the Valletta 2018 Cultural Programme engages with communities and artists locally and beyond the Maltese shores.

The results of the 2016 research are already in use by the various departments within the Foundation, with regular update presentations and meetings being planned throughout 2017, to allow the Foundation to continuously monitor how this is performing and if any adjustments are required.

Furthermore, the Foundation publishes the results of this process to ensure that the general public is aware of the impacts being generated by Valletta 2018 and how public funds available to implement the project are being used.

The Foundation augurs that although this extensive research process is being carried out in the years leading to and during 2018, a further evaluation of the ECoC may also occur in the medium term, post 2018.

## **Valletta 2018 Foundation**

Exchange Building  
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